## Client Transition Introduction Kit Welcome Letter

Send the Welcome Letter along with your new Introduction Kit **two weeks** after the Client Transition has been fully initiated. This means they will have received the following item ahead of it:

* Week 1 - Welcome Card

*Refer to the sample, below:*

[Date]

[Name]

[Address]

Dear [Transitioning Client],

Thank you for the time you recently took to speak with us and learn more about our significant decision to work in partnership with [firm name]. We also deeply appreciate the efforts you took to complete the necessary documentation to get things fully underway for you at [firm name].

As you are aware, a great deal of time, energy, due diligence, and thoughtful consideration was put into this important decision. We know the benefits of our new arrangement will have a meaningful impact on how we are able to provide for you and your family with comprehensive wealth management advice and investment solutions. We look forward to sharing more about this with you in the months and years ahead!

As you know, we have a professional support team available to assist you and they are committed to serving our preferred clients. Our team members include:

[Name], Client Service Coordinator: [Phone Number]

[Name], Administrative Assistant: [Phone Number]

Please contact us if you have any questions about the current transition process you are going through and we will be more than happy to assist.

We look forward to helping you achieve your goals and objectives.

Sincerely,

[Advisor’s Name]

[Advisor’s Title]